# Partner Tools

Scott Kirby / Bryan LeMoine PCC Users Conference 2016





# Partner Logging Utilities

Overview: Partner logs many of the configuration changes that are made within the application. Some of these changes are accessible via interfaces that are available to the user. We will be looking at two of these -

- 1. The Table Log Program (tablelog)
- 2. The Policy Log Program (policylog)

# Table Log (tablelog)

- Allows a user to search for changes made in Partner's Table Editor (ted) menu.
- Presents output containing the table, entry, user, timestamp, and specifics of the changes made.
- Restriction criteria based on Date Range, Time, Users, Tables, Entries, and on the type of modification that was made to the table (Additions, Deletions, Edits).
- Sortable by User and Table.



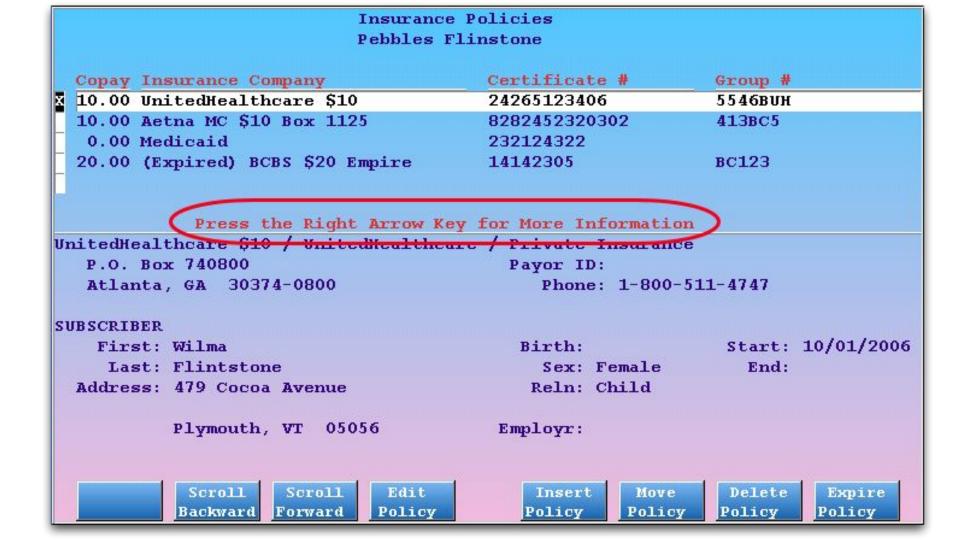
#### From: 04/01/11 To: 04/04/11

Generate On: 04/04/2011

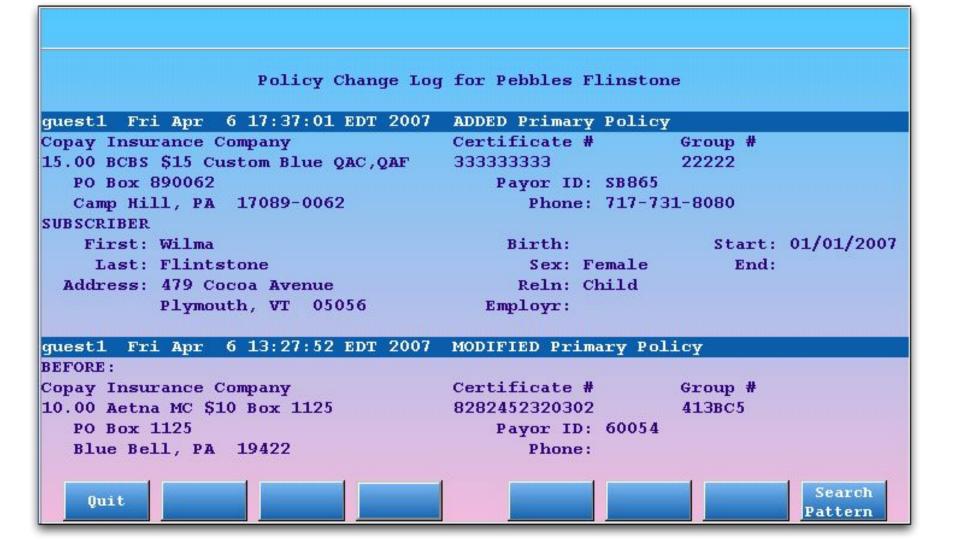
)ate	Time	Table	(#)Entry Name	User	Action M	ethod
BEFOR	E: Provi	der Visit I	(8)Well Visit Length 2 (Williams): 30. Length 2 (Williams): 20.		Modify T	ed
BEFOR AFTE	E: Price R: Price	m Procedure Sch A: \$79 Sch A: \$95 is report:		joan	Modify T	ed
	and the second	01/11 to 04 00am to 11:				
	ng Users					
Дол	թ Jump	to Jump t Bottom	and the second se		Se Pat	arch

# Policy Log (policylog)

- Allows a user to review the changes made to a policy (or policies) for a specific patient.
- Contains information for changes as far back as 2007.
- Contains 'before' and 'after' information about the policy in question, as well as details about the change that was made (user, timestamp, type of change).
- Can be accessed through the policy screen, or as a standalone program.



and the second se	rance Company edHealthcare \$10	Certificate # 24265123406	Group # 5546ВVН	
UnitedHeal	theare \$10 / UnitedHealth	hcare / Private Insuran	ce	
P.O. Bo	к 740800	Payor ID:		
Atlanta	, GA 30374-0800	Phone: 1-800	-511-4747	
UBSCRIBER				
First:	Wilma	Birth:	Start:	10/01/2006
Last:	Flintstone	Sex: Female	End:	
Address:	479 Cocoa Avenue	Reln: Child		
	Plymouth, VT 05056	Employr:		



#### Who, When, What (a.k.a., the Blame Game)

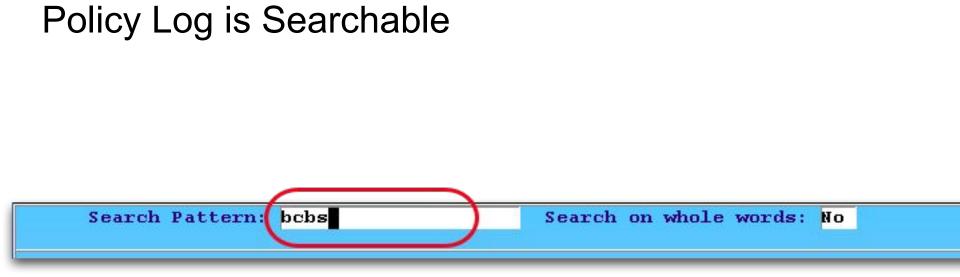


## Added Policy

guest1 Fri Apr 6 17:37:01 EDT 2007	ADDED Primary Policy	Y
Conay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC,QAF	33333333	22222
PO Box 890062	Payor ID: SB865	
Camp Hill, PA 17089-0062	Phone: 717-73	31-8080
SUBSCRIBER		
First: Wilma	Birth:	Start: 01/01/2007
Last: Flintstone	Sex: Female	End:
Address: 479 Cocoa Avenue	Reln: Child	
Plymouth, VT 05056	Employr:	

#### **Modified Policy**

quest1 Fri Apr 6 17:49:10 EDT 2007	MODIFIED PELMARY PO.	LICY	
BEFORE :	a		
	Certificate #		
15.00 BCBS \$15 Custom Blue QAC,QAF			
PO Box 890062	Payor ID: SB865		
Camp Hill, PA 17089-0062	Phone: 717-73	31-8080	
SUBSCRIBER			
First: Wilma	Birth:	Start:	01/01/2007
Last: Flintstone	Sex: Female	End:	
Address: 479 Cocoa Avenue	Reln: Child		
Plymouth, VT 05056	Employr:		
AFTER:			
	Certificate #	-	
15.00 BCBS \$15 Custom Blue QAC,QAF	44444444	22222	
PO Box 890062	Payor ID: SB865		
Camp Hill, PA 17089-0062	Phone: 717-73	31-8080	
SUBSCRIBER			
First: Wilma	Birth:	Start:	03/01/2007
Last: Flintstone	Sex: Female		
Address: 479 Cocoa Avenue	Reln: Child		
Plymouth, VT 05056	Employr:		



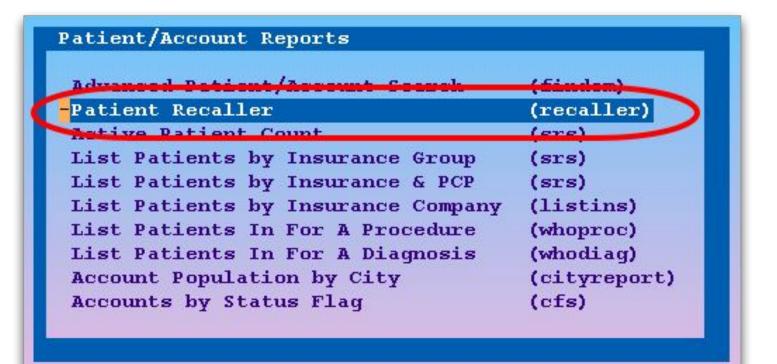
#### Search Results

guest1 Fri Apr 6 17:49:10 EDT 2007	MODIFIED Primary Po	Licy
BEFORE :		
Copay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC, QAF	33333333	22222
PO Box 890069	Payor ID: SB865	
Сатр Hill, РА 17089-0062	Phone: 717-73	31-8080
SUBSCRIBER		
First: Wilma	Birth:	Start: 01/01/2007
Last: Flintstone	Sex: Female	End:
Address: 479 Cocoa Avenue	Reln: Child	
Plymouth, VT 05056	Employr:	
AFTER:		
Copay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC, QAF	44444444	22222
PO Box 890065	Payor ID: SB865	
Camp Hill, PA 17089-0062	Phone: 717-73	31-8080
SUBSCRIBER		
First: Milma	Rinth	Start+ 03/01/2007

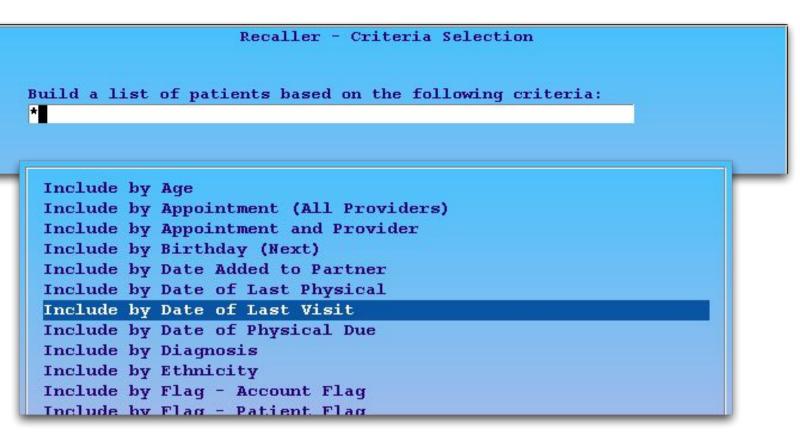
## **The Patient Recaller**

- Generates Patient Lists
- Accepts a wide range of Inclusion and Exclusion Criteria
- Supports multiple output options, including form letters.
- List criteria can be saved and reused

#### Accessing the Patient Recaller



#### **Recaller Criteria Selection**



#### Individual Criteria Example:

Recaller - Criteria Selection

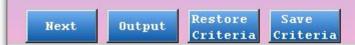
Report

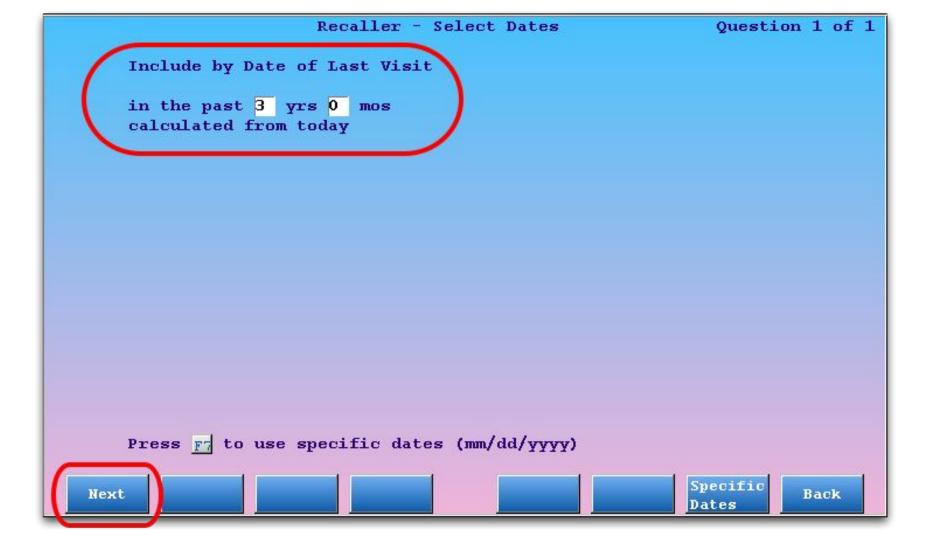
Details

Use 'or'

Criteria

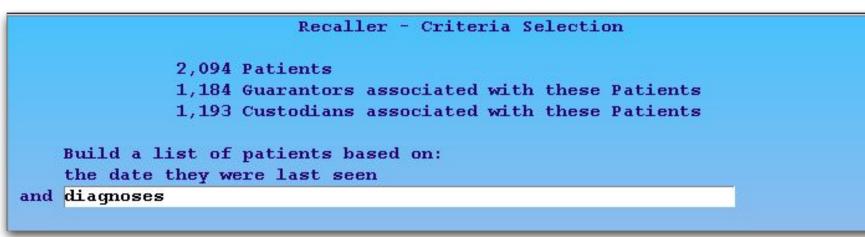
Build a list of patients based on the following criteria: Include by Date of Last Visit





Recaller - Criteria Selection
2,094 Patients 1,184 Guarantors associated with these Patients 1,193 Custodians associated with these Patients Build a list of patients based on:
the date they were last seen       and
Next         Output         Restore Criteria         Save Criteria         Report Details         Use 'or' Criteria         Back

#### Adding Additional Criteria





#### The following is a listing of Items/Groups that matched the Pattern entered. Select/Deselect items from the listing below.

- \* 493.00 Asthma Extrinsic NOS (Major Diagnosis)
- \* 493.00 Asthma Mild Intermit (Major Diagnosis)
- \* 493.00 Asthma Mild Persist (Major Diagnosis)
- 493.00 Asthma Mod Persist (Major Diagnosis)
- \* 493.00 Asthma Sev Persist (Major Diagnosis)
- \* 493.01 Status Asthmaticus
- \* 493.01 ~Asthma Acute
- \* 493.02 Asthma Extrinsic w/Acute Exacer
- \* 493.10 Asthma Intrinsic NOS (Major Diagnosis)
- \* 493.12 Asthma Intrinsic w/Acute Exacer
- \* 493.22 Asthma Chron Obstr w/Acute Exac
- \* 493.82 Asthma Cough Variant (Major Diagnosis)
- \* 493.90 Asthmatic Bronchitis
- \* 493.91 ~Status Asthmaticus



Recaller - Report Details

493.02

Send

Το...

Criteria:

Build a list of patients based on the date they were last seen and diagnoses

Selections:

Done

```
the date they were last seen
in the past 3 yrs
calculated from today
```

diagnoses they have had in the past 3 yrs calculated from today diagnoses: 493.00 Asthma Extrinsic NOS (Major 493.00 493.00 Asthma Mild Persist (Major 493.00 493.00 Asthma Sev Persist (Major D 493.01

Jump to

Bottom

493.01 ~Asthma Acute

fop

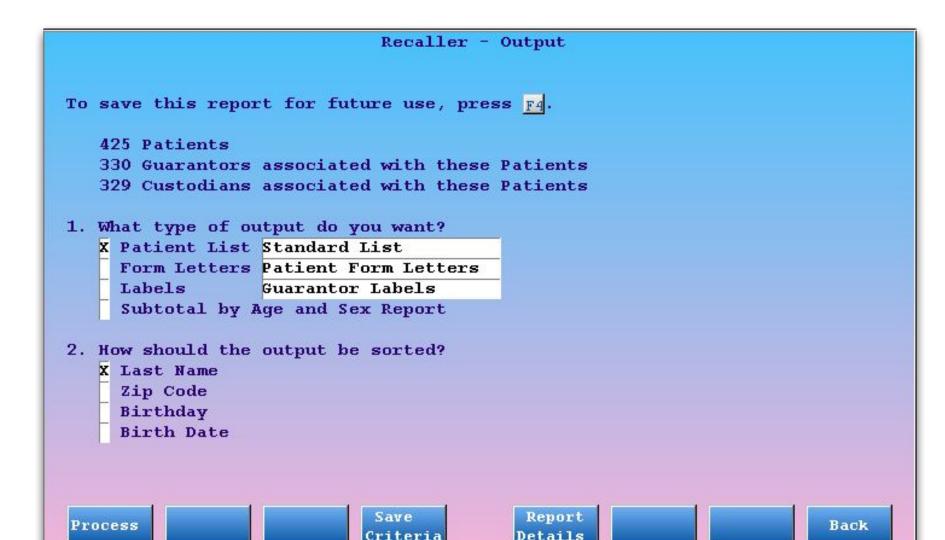
Jump to

Asthma Mild Intermit (Major Asthma Mod Persist (Major D Status Asthmaticus

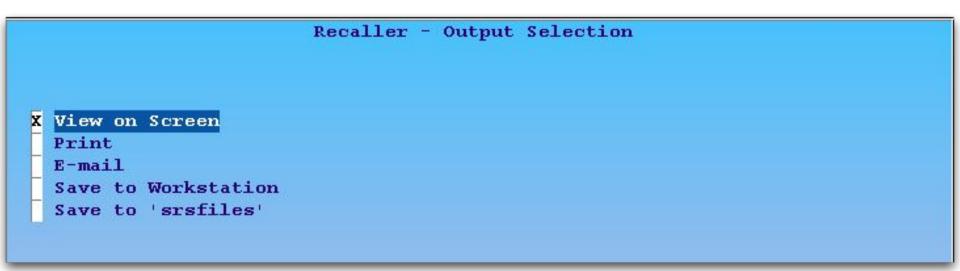
Asthma Extrinsic w/Acute Ex







## **Select Output Destination**



Achey, Diane Custodian: Jeremy Achey Phone: 802-474-7187 575 Old Ford Drive Cabot, VT 05647 Addington, Michael Custodian: Jeffrey Addington Phone: 802-130-6763 730 Grandview Drive Saint Albans Bay, VT 05481 Aftosmes, Lais T. Custodian: Cheryl Aftosmes Phone: 802-290-3167 Saint Albans Bay, VT 05481 Alwine, Kyle Custodian: Dawn Sweigart Phone: 802-778-1654 83 Jury Street Ely, VT 05044 Amos, Dustin Custodian: William L Amos Phone: 802-380-2702 5735 Mapledale Road Putney, VT 05346 Anderson, Jennifer M Custodian: Debra Anderson Phone: 802-413-9166 734 North Street, Apt 5 Websterville, VT 05678 Andrus, Eric Custodian: Richard Andrus Phone: 802-911-3478 46 Bonnywick Drive Newport, VT 05855 Ardire, Adrian Custodian: Gerald Ardire Phone: 802-327-8692 866 South OTh Street Westfield, VT 05874 Arndt, Chris Custodian: Kevin Arndt Phone: 802-453-8438 576 E Water Street Richford, VT 05476 Atnip, Andrew Custodian: Connie Atnip Phone: 802-782-5029 760 Snyder Drive Hartland Four Corners, VT 05049 Atnip, Melissa Custodian: Connie Atnip Phone: 802-782-5029 760 Snyder Drive Hartland Four Corners, VT 05049 Jump to Jump to Send Search Done Top Bottom Pattern Το...

# Insurance Configuration Menu (insconfig)

- Central location for a variety of useful Insurance Configuration Tools
- Many of these tools are advanced, and merit training prior to use
- Contains configuration tools as well as reports

#### Insurance Configuration

F1	Edit Insurance	Table			(ted)		
F2	Override Provid	ler ID#s by	Insurance Ba	tch	(provids	)	
F3	Edit I_ files				(ibar)		
F4	HCFA Form Confi	guration			(hedfe)		
F5	Edit Allowable/	Contract Sc	hedule		(allowed	it)	
F6	List Insurance	Groups			(byins)		
F7	List Insurance	Plans by Ir	surance Batc	h	(bybatch	)	
F8	List Insurance	Batches by	ced Configur	ation	(bygenrc	)	
0	verride Edit	Edit	Edit Fee	List	Inscos	Batch I	by

Edit

#### List Insurance Plans by Group (byins)

```
INSURANCE COMPANIES IN GROUP Medicaid
   1.Collections
   MEDICAID
INSURANCE COMPANIES IN GROUP Aetna USHC HMO
   Aetna USHC HMO $0 CHIP
   Aetna USHC HMO $10
   Aetna USHC HMO $10/10
   Aetna USHC HMO $10/15
   Aetna USHC HMO $10/25
   Aetna USHC HMO $14
   Aetna USHC HMO $15
   Aetna USHC HMO $15/20
   Aetna USHC HMO $16/21
   Aetna USHC HMO $17/22
   Aetna USHC HMO $18/30
   Aetna USHC HMO $20
   Aetna USHC HMO $2/5
    Aetna USHC HMO $30
   Aetna USHC HMO $5/10
    Aetna USHC HMO $5/15
```

#### List Insurance Plans By Batch (bybatch)

HCFA Batch 'Other HCFA Forms(other)' includes the insurance companies: Aetna PPO/ Watkins Auto/Related Private Insurance BCBS Basic Cov OBD Cigna Ins. Cigna Ins.20% all services Cigna PPO \$10 Cigna PPO \$15 Cigna PPO \$20 Devon Health Services Fortis Insurance Company Fortis Insurance Company \$40 GEHA/PHCS Great-West Healthcare Miscellaneous Insurance North American Health Plan/PHCS PHCS The Mega Life & Health Ins. Co. TriCare UnitedHealthcare UnitedHealthcare UnitedHealthcare \$10 UnitedHealthcare \$15 UnitedHealthcare \$15 UnitedHealthcare \$15 TRV

# Insurance Special Information Files (ibar)

- Configured with each plan in the ted Insurance Companies Table
- Editable manually (significant training required) or via the ibar program (recommended).
- Control the behavior of the various procedures when billed (and more...)

Special	Information	File (	(I-bar)	Editor
States and the second se				

I-bar File to Edit:

- F2 Change Pending Status for All Procedures
- F: Change HCFA Batching Status for All Procedures
- F4 Change Copay Information for All Procedures
- FS Change Base Fees for All Procedures
- Ff Change WriteOff/Capitation Information for All Procedures
- F List Insurance Companies Using Selected I-bar File
- FS Change All Above Settings for One Procedure





	31.25		4		
	/ d	latbeta/config/IC_ot	her		
Procedure			Pend		
Group (	Code Pr	cocedure Name	Insurance		
	TE	MPLATE	Yes		
Newborn Ca 9	99440 ~E	Worn Resuscitatio	No		
Newborn Ca 9	99440 Ne	wborn Resuscitatio	No		
Newborn Ca 9	99436 At	tendance At Delive	No		
Newborn Ca 9	99433 Ne	wborn Care Subsequ	No		
Newborn Ca 9	99431 Ne	whorn Care Initial	No		
Well Child 9	99395 но	2 18 to 39 yrs	No		
Well Child 9	99394 но	2 12-17 yrs	No		
Well Child 9			No		
Well Child 9	99392 но	1-4 yrs	No		
Well Child 9	99391 но	under 1 yr	No		
Well Child 9	99385 Ne	w HC 18 to 39 yrs	No		
Well Child 9	99384 Ne	w HC 12-17 yrs	No		
Well Child 9	99383 Ne	w HC 5-11 yrs	No		
Well Child 9	99382 Ne	w HC 1-4 yrs	No		
Well Child 9	99381 Ne	w HC under 1 yr	No		
Misc Offic 9	99362 Me	dical conference	No		
Misc Offic 9	99361 Me	edical Conference	No		
Hospital P 9	99357 Pr	col Serv f2f IH Ad	No		
SaveTBar Sou	rt By Sort	By Sort By	Select S	Select Select	ConvTemp

# Thanks For Coming!!!

